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HMIS CLIENTTRACK USER MANUAL

2015

*A guide to navigating ClientTrack, a web-based case management tool,
from entering basic client information to managing case loads and reports.*

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CLIENTTRACK USER MANUAL

Objectives

Thank you for using ClientTrack as your Homeless Management Information System (HMIS). HMIS is an electronic data collection system that stores longitudinal client-level information about persons who access a variety of services for homeless prevention and/or rapid re-housing services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. HMIS enables information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

- **Contacts**
 - Staff List and Contact Information
 - HMIS Help Desk Information
- **Review Security Policies and Procedures**
 - Implied Consent Policy
 - Computer Storage
 - User Name and Password
- **Overview of ClientTrack Features**
 - User Dashboard
 - Case Management Tools
 - Client Record
 - Household Members
- **Entering Client Information and Managing Program Enrollments**
 - Intake Workflow
 - Services
 - Case Notes
 - Update/Annual Assessment
 - Exit Workflow
- **Basic Reports**
 - Service Summary
 - Annual Performance Review (APR)
 - CAPER

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Contacts

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HMIS HELP DESK

If you encounter any issues with ClientTrack at any time, please contact the help desk with the appropriate email below. Please do not send any identifying information for clients when emailing the help desk. There is a unique client ID number assigned to each client record in the system and you can find this number beside the client name at the top of the client record. **Please use the client ID number when emailing the help desk if applicable.**

HMIS Help Desk: HMISHelpDesk@ihcdaonline.com

CLIENTTRACK ACCESS

You can access HMIS with the following link:

HMIS BALANCE OF STATE CLIENTTRACK

[HTTPS://IHCDAONLINE.COM/INDIANAUW/](https://ihcdaonline.com/indianaauw/)

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Security Policies & Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called "Intake Posting" and "Agency Websites" and can be downloaded from the IHCD website at <http://www.in.gov/myihcda/2444.htm>.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in ClientTrack. ***No person is to be refused services regardless of their participation in ClientTrack.***

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). ClientTrack security policies require the use of strict passwords.

Passwords must have:

- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character
- At least one capital letter

New passwords will be required upon first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** If you need assistance with your username and password contact the Help Desk by emailing HMISHelpDesk@ihcdaonline.com and someone will assist you.

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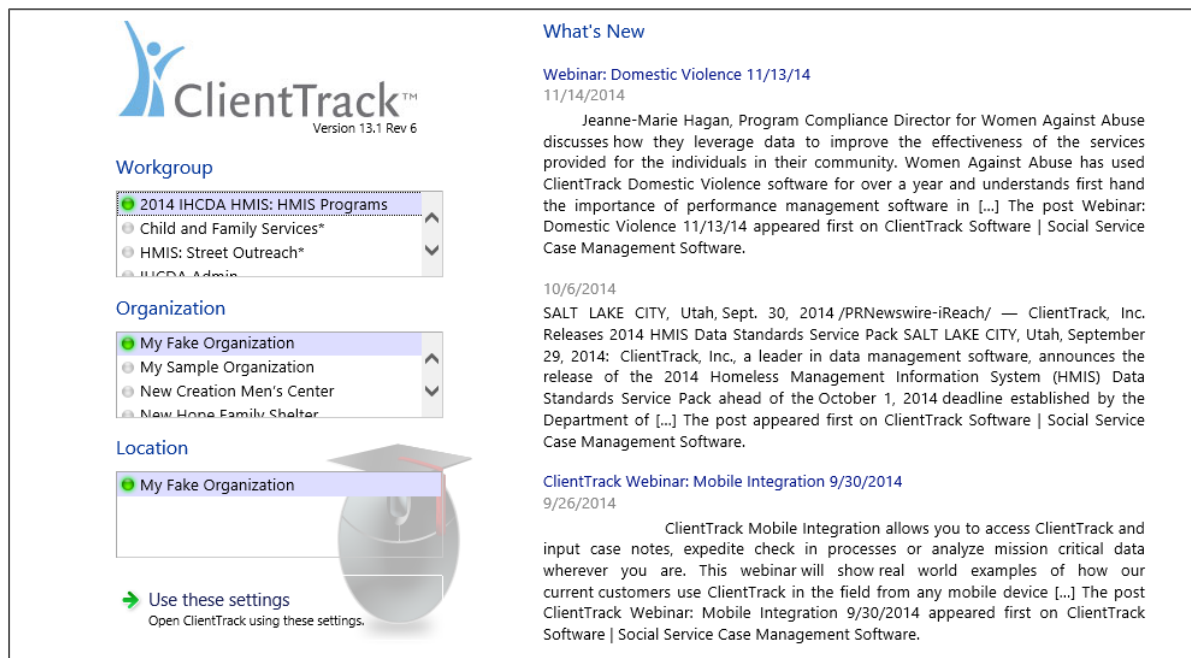
LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, Mobile Safari and Mozilla's Firefox.

Open your web browser and go to <https://ihcdaonline.com/IndianaUW/>. Enter your assigned User Name and Password and click "Sign In." **Remember, sharing your user name and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**



Your organization may participate in one of two or both workgroups called "2014 IHCD A HMIS: HMIS Programs" or "2014 IHCD A HMIS: Street Outreach." Be sure to select the appropriate workgroup when logging in as it makes a difference for which programs you can manage. Also make sure your organization and location is selected appropriately. Click on "Use These Settings" to continue. You will be required to "Accept" the Terms of Agreement when you log into the system for the first time.



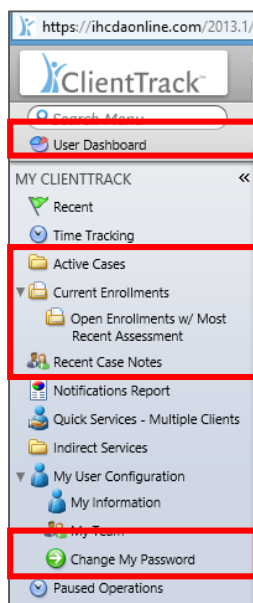
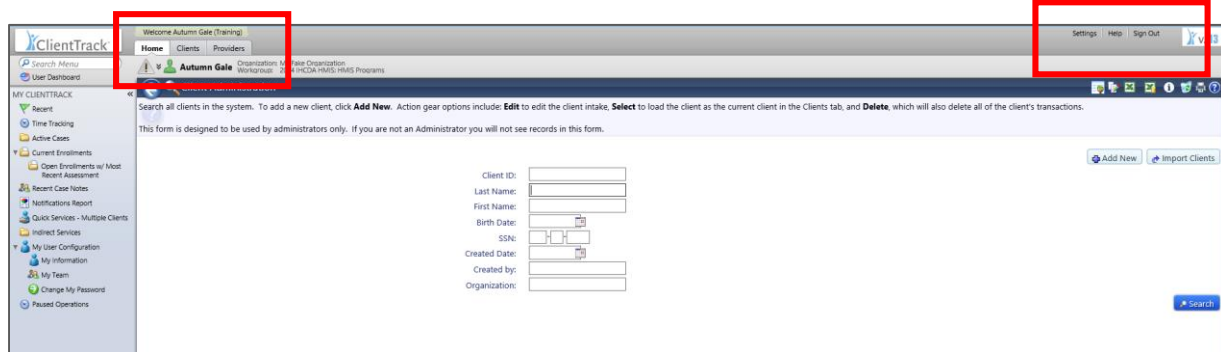
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Overview of ClientTrack Features

USER DASHBOARD

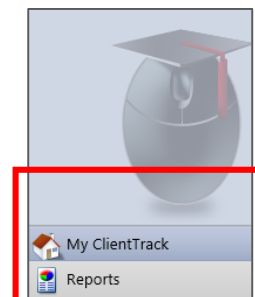
You will be directed to your **User Dashboard** on the **"Home"** tab and notified of any important **"HMIS News"** items IHCD wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in. All three tabs on this screen, **"Home," "Clients"** and **"Providers,"** outlined with the red box below, provide you access to different sections of ClientTrack.

If you have access to more than one workgroup, you can use the **"Settings"** link in the upper right-hand corner of the screen to toggle between the workgroups without logging out. The **"Sign Out"** link is in this same location as well. **Please be sure to "Sign Out" any time you need to leave the database to ensure security of client data.**



On the **"Home"** tab there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under **"My ClientTrack."** You can also change your password with the **"Change My Password"** link by clicking on **"My User Configuration"** in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

You will also find the **"Reports"** section on the **"Home"** tab. To run a variety of reports, which will be detailed later in this manual, click on **"Reports"** found below **"My ClientTrack"** in the bottom left-hand corner of the screen to access reports.

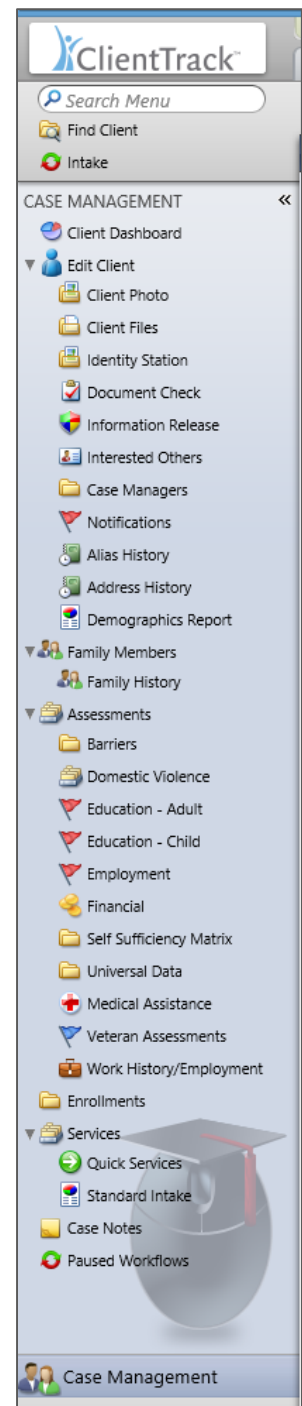


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CASE MANAGEMENT TOOLS

On the “**Clients**” tab you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record:

- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your project.
- **Case Management Tools: (Frequently Used)**
 - **Client Dashboard** – The overview of the client record as seen on the next page.
 - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under “Edit Client” that are available for you to use depending on your agency’s needs and requirements.
 - **Family Members** – To manage household members.
 - **Assessments** – To review assessments and please note that all required assessments for your project are captured in the Intake Workflow. This is where you can access the **Self-Sufficiency Matrix**.
 - **Enrollments** – To view the list of current and past enrollments the client has participated in.
 - **Services** – To add, edit and view the list of services the client has accessed.
 - **Case Notes** – To create, edit and view case notes.
 - **Paused Workflows** – To resume a workflow you previously paused.
- **Basic Client Information and Client ID Number** - Located at the top of the client record and includes the client’s name, gender, date of birth, etc. The client ID number is located beside the client name at the very top of the client record (Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk).
- **Project Enrollments** – To view the list of current and past enrollments the client has accessed.
- **Case Manager Assignments** – To manage case manager assignments for specific enrollments.
- **Services** – To add, edit or remove services associated with your project enrollment.



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CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage program enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number, which is automatically assigned to the record when created, beside the client's name at the top of the record.

1. Basic Client Information and Demographics

2. Enrollment Information

3. Case Assignments

4. Services

2. In the center of the client record, you will see all of the client's past and present **program enrollments** as seen below.

Jack's Enrollments

Previous

My Fake Organization (ESGS - R10)

1 02/02/2015 02/13/2015 My Fake Organization 02/13/2015 18 19

There is a blue play button or action wheel you can click on to easily manage your program enrollment. When you click on the blue play button, a drop down list will appear where you can:

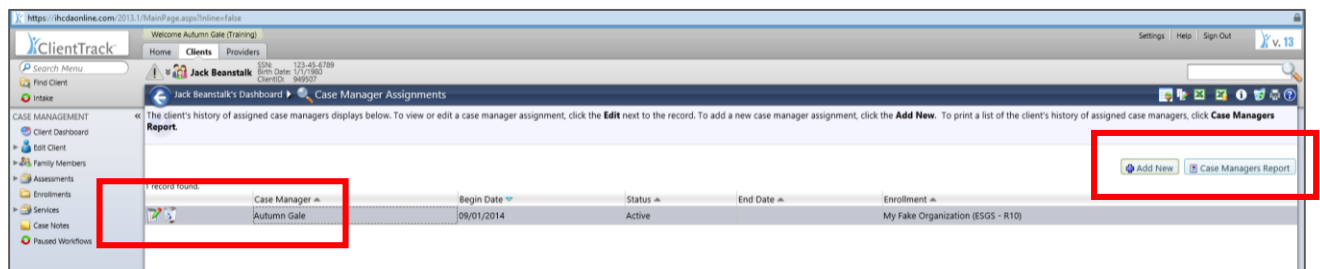
- **Re-enter the Enrollment** – Use this feature to re-enroll a client who was prematurely discharged or his/her enrollment status changed to continue services.
- **Add Family Member** – Use this feature if a new household needs to be enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment.

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- **View Case Members** – View all case members associated with the specific project enrollment.
- **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature. This is helpful in completing missing data that was not captured at those points in time.
- **Conduct an Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client’s status since enrollment.
- **Exit the Enrollment** – To exit a client, select “Exit the Enrollment” and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member’s client record and conduct the exit workflow without exiting the household.

3. Case Manager Assignments are located below the enrollments section of the client record. You can manage case assignments here by clicking on the “**Jack’s Case Manager Assignments**” as outlined on page 7 or clicking on the little notepad beside the case manager’s name. Clicking on the **recycle bin** beside a case manager’s name will delete the case manager from the client record.

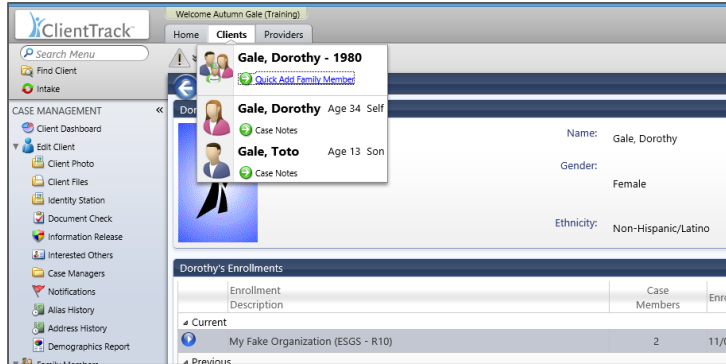
By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record.



4. Services associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on “**Services**” in the list of case management tools on the left-hand side of the client record or by clicking “**Jack’s Services**” above the list of services on the client record. Documenting services is discussed in detail on pages 24 and 25 of this manual.

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HOUSEHOLD MEMBERS

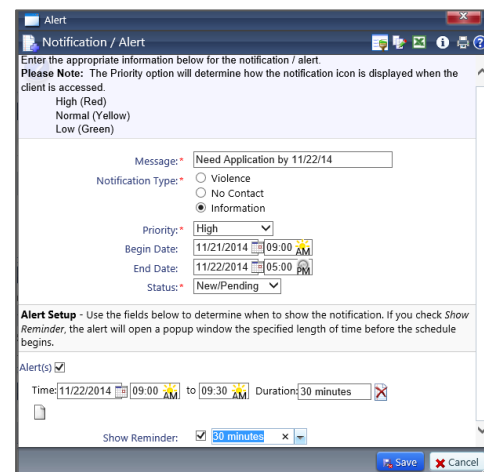
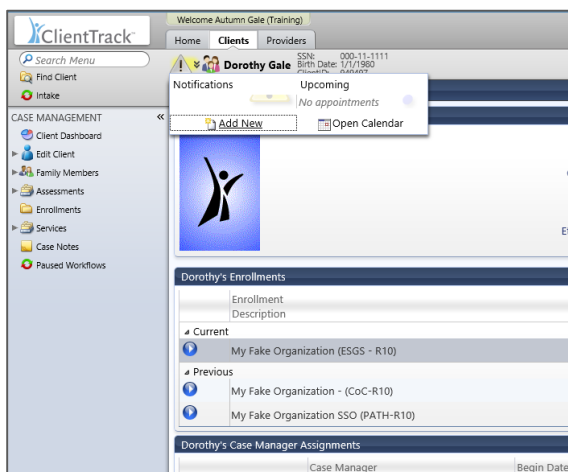


You can view household members and their client records by clicking on the **multi-colored family icon** at the top of the client record beside the client name. A drop down list will appear with all of the current household members. You can click on the names of the household members in the drop down list to go directly to his/her client record. You can also use the **“Quick Add Family**

Member” link in this drop down to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the **“Add Family Member”** feature (described on page 7) listed when you click on the blue play button beside your program enrollment. This will prompt you through the new household member’s information as well as the intake workflow to include the new household member in the enrollment. Be sure to change the date to reflect the actual date of enrollment.

NOTIFICATIONS

ClientTrack features a **“Notifications”** tool on the client record that allows you to set up notifications specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool is located beside the multi-colored family icon at the top of the client record. To add a new notification, click on the triangle with the exclamation point (!) inside of it. A drop down list will appear and then select **“Add New”** to add a new notification. A new window will open where you can set up the new notification.



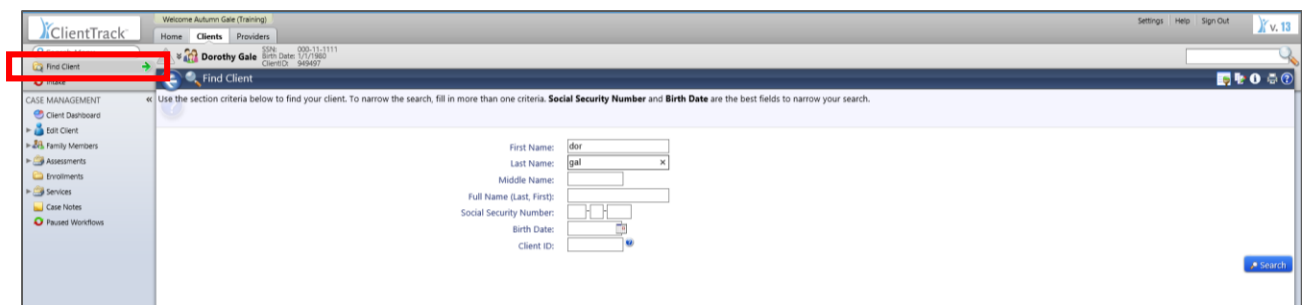
After setting up the notification, you will notice that the triangle changes color, and if you click on the notification icon you will see your notification populate in the drop down.

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Entering Client Information and Managing Program Enrollments

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, click on “**Find Client**” in the upper left-hand corner of the screen as outlined in red below.



It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as “Joe” in addition to “Joseph” or “Jen” in addition to “Jennifer.”

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the **Clients Tab** will be associated with the currently selected client.

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IHCDA works to eliminate duplicate clients in ClientTrack. Please contact the HMIS Help Desk at HMISHelpdesk@ihcdaonline.com with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please **ONLY** send Client ID numbers. Client ID numbers are found to the right of the client name on the client dashboard.

ClientTrack interface showing the 'Find Client' search results. The 'Edit Client' link in the left sidebar is highlighted with a red box. The search results table shows one record found for Dorothy Gale.

First Name	Last Name	Middle Name	SSN	Birth Date
Dorothy	Gale		XXX-XX-1111	01/01/1980

If the client's basic information has changed, you should click on the **"Edit Client"** case management tool found on the left-hand side of the screen outlined in red above to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). *****Please note that the "Save" button will save the changes you made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.***

ADDING A NEW CLIENT WITH PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the necessary information.

After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen below.

ClientTrack interface showing the 'Add or Edit' dialog box. The 'Add a new client' option is selected.

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Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client lookup, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.

Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status and address. Click **"Finish"** when the client's basic information is complete. **Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. Please do not make up information or answer for the client.**

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Definitions of Basic Client Information Requirements

- **First Name** - Legal first name (do not add nicknames in “quotes” because those are not searchable elements. Add this information to the alias field.)
- **Last Name** – Legal last name
- **Social Security Number (SSN)** – If the client doesn’t know or refuses to provide their SSN, DO NOT under any circumstance, enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client’s response.
- **Birth Date** – Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client’s response.
- **Ethnicity** – Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** – A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once.
- **Gender** – Select gender with which the client identifies.
- **Disabling Condition** – Select the appropriate response as reported by the client.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select “Yes” for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Family** – Do NOT enter anything in the “Family” field. ClientTrack will create a household/family account.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to “Self.” It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

Adding Household Members

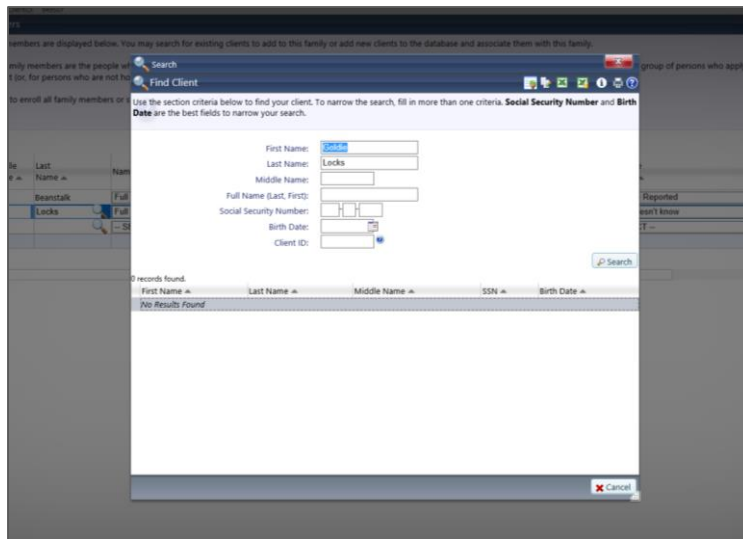
Next you will add any additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member. You can tab through the fields to complete the required information, and you can add any number of household members at this time by repeating these steps.

The screenshot displays the 'Family Members' section of the ClientTrack application. At the top, there's a header with 'Welcome Autumn Gate (Training)' and navigation tabs for 'Home', 'Clients', and 'Providers'. Below this, a breadcrumb trail shows 'Intake' > 'Basic Client Information' > 'Family Members'. The main content area contains instructions: 'The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.' It also includes a note about family members and a workflow description. A table lists family members with columns: First Name, Middle Name, Last Name, Name Quality, Gender, Other Gender, Birth Date, Age, Birth Date Quality, SSN, and SSN Quality. Two entries are shown: 'Jack Beanstalk' and 'Goldie Locks'. The 'Goldie Locks' row is selected. At the bottom, there's an 'Add Lines' button and a counter showing '1'.

First Name	Middle Name	Last Name	Name Quality	Gender	Other Gender, please specify	Birth Date	Age	Birth Date Quality	SSN	SSN Quality
Jack		Beanstalk	Full name reported	Male		01/01/1980	34	Full DOB Reported	123 - 45 - 6789	
Goldie		Locks	Full name reported	-- SELECT --		N/A		Client doesn't know		Client doesn't know
			-- SELECT --	-- SELECT --		N/A		-- SELECT --		-- SELECT --

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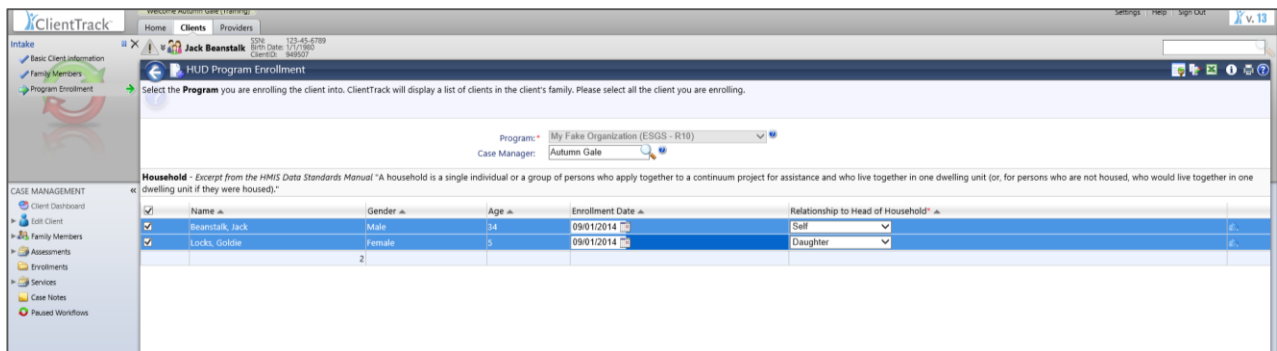
The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **“Cancel”** in the search window and proceed entering the new household’s information in the required data fields. Click **“Save & Close”** when finished adding household members.



Program Enrollment

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an **asterisk *** are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

Select your **“Program”** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the program enrollment screen (as seen above), the client will be enrolled in your program. You can de-select a client by clicking on the check mark beside his/her name to remove the check mark and ensure the client is not enrolled.



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Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.

If you do not find your program option when enrolling a client, cancel the workflow by clicking the black “X” in the workflow screen found in the upper left-hand corner and please notify IHCD immediately at HMISHelpDesk@ihcdaonline.com. Program information must be set up in the system before you can begin to enroll clients.

HMIS Universal Data Assessment

Complete all the required data fields indicated by an **asterisk *** and click “**Save**” to continue.

The screenshot shows the 'Universal Data Assessment' form in the ClientTrack system. The form is divided into several sections with various input fields and dropdown menus. The left sidebar contains navigation links for 'Intake', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Assessment', and 'Golden Locks'. The main form area includes fields for 'Assessment Date', 'Age at Assessment', 'Assessment Type', 'Assessor', 'Program', 'In Permanent Housing', 'Housing Status', 'Client Location', 'Prior Residence', 'Length of Time on Street', 'Health Insurance', and a table for 'Existing Sources'. The 'Existing Sources' table has columns for 'Type', 'Is Primary', 'Status', 'Reason No', 'Start Date', and 'End Date'. The 'Save' button is located at the bottom right of the form.

Definitions of Universal Data Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **In Permanent Housing** – Select “Yes” or “No” if the client is in permanent housing. This question is only asked for ESG clients.
- **Housing Status** – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon. There is a red box above to assist you in finding this icon.
- **Residence Prior to Program Entry** – Identify where the client was staying on the night before the client is enrolled in your program.
- **Length of Stay** – Identify the length of stay for the residence prior to program entry.

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- **Chronic Homeless Assessment** - An unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or more OR has had at least four (4) episodes of homelessness in the past three (3) years. To be considered chronically homeless, persons must have been sleeping in a place not meant for human habitation (e.g., living on the streets) and/or in emergency shelter during that time.
- **Health Insurance Assessment** – Complete the required information pertaining to the client’s insurance status.

Veteran Assessment

The Veteran Assessment will only be included in the workflow if you select “Yes” for the “Veteran Status” on the basic information screen of the client (as seen on page 12). If the Veteran Status is “No,” then the Veteran Assessment will not be collected in your program enrollment. Please be sure to review the Veteran Status with the client and select the appropriate response on the “**Basic Client Information**” screen of the intake workflow or “**Edit Client**” screen on the client record.

ClientTrack

Welcome Autumn Gale (Training)

Home Clients Providers

123-45-6789
5555 Dune
ClientID: 949007

Settings Help Sign Out v. 1.0

Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Jack Beanstalk
- Assessment
- Veteran Details
- Barriers / Special Needs
- Domestic Violence
- Substance

CASE MANAGEMENT

- Client Dashboard
- Int Client
- Family Members
- Assessments
- Enrollments
- Services
- Case Notes
- Paused Workflows

Case Management

Veteran Assessment

The Veteran assessment is used to collect details about the veteran's service.

Assessment Active

Assessment Date: 09/01/2014 [Calendar Icon] Default Last Assessment

Branch and Discharge Status - Please select the branch and discharge status. The HMIS Data Manual provides the following instructions for veterans serving in more than one branch: "For veterans who served in more than one branch of the military, select the branch in which the veteran spent the most time. In the event that a client's discharge status is upgraded during enrollment, the record should be edited to reflect the change."

Branch of the Military: Army [Dropdown]
Discharge Status: Honorable [Dropdown]

Military Service Dates - In the interest of data quality ClientTrack provides date fields and encourages users to enter exact dates if possible. If not, use the first of the year or another standard date determined by your organization. For HMIS purposes, ClientTrack will always calculate years of military service only using year.

Service Entry Date: 11/01/2011 [Calendar Icon] Service Exit Date: 10/01/2014 [Calendar Icon]

Please Select Theatre(s) of Operation(s)

Theatre of Operation	Status
Theatre of Operations: World War II	No [Dropdown]
Theatre of Operations: Vietnam War	No [Dropdown]
Theatre of Operations: Persian Gulf War (Operation Desert Storm)	No [Dropdown]
Theatre of Operations: Afghanistan (Operation Enduring Freedom)	No [Dropdown]
Theatre of Operations: Iraq (Operation Iraqi Freedom)	Yes [Dropdown]
Theatre of Operations: Iraq (Operation New Dawn)	No [Dropdown]
Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	No [Dropdown]
Theatre of Operations: Korean War	No [Dropdown]

Save

On the Veteran Assessment, you will be required to select all “**Theatre(s) of Operation(s)**” to move forward in the workflow. To indicate which operation your client served in, change the “**Status**” of the specific operation to “Yes” with the drop down in that row. You can select more than one operation of service by changing the status to “Yes” for each one. To complete the Veteran Assessment, click “**Save**.”

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment

The screenshot shows the ClientTrack interface for the HMIS Barriers Assessment. The left sidebar contains navigation links for Intake, Basic Client Information, Family Members, Program Enrollment, Jack Beanstalk, Assessment, Veteran Details, Barriers / Special Needs, Domestic Violence, and Case Management. The main content area is titled 'Barriers' and includes a 'Default Last Assessment' button. Below this is a table with columns: Barrier, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, and How Confirmed. The table lists several barriers: Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. Each barrier has a 'Barrier Present?' column with a 'Yes' or 'No' dropdown menu. The 'Alcohol Abuse' row is highlighted in blue.

Barrier	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	How Confirmed
<input checked="" type="checkbox"/> Alcohol Abuse	Yes	No	Yes	No	
<input type="checkbox"/> Developmental Disability	-- SELECT --				
<input type="checkbox"/> Drug Abuse	-- SELECT --				
<input type="checkbox"/> HIV/AIDS	-- SELECT --				
<input type="checkbox"/> Mental Health	-- SELECT --				
<input type="checkbox"/> Physical Disability	-- SELECT --				
<input type="checkbox"/> Chronic Health Condition	-- SELECT --				

To select a barrier, click on the drop down box for **“Barrier Present”** and change the status to **“Yes.”** The system defaults **“No”** for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment

date – the date the client presents to you and qualifies for enrollment. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). If no barriers are present at enrollment, click **“Save & Close”** without changing any barriers.

Domestic Violence Assessment

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **“Yes” for “Domestic Violence Experience,”** you will be prompted for more information. If the client reports no domestic violence, then click **“Save”** to continue through the workflow.

The screenshot shows the ClientTrack interface for the Domestic Violence Assessment. The left sidebar is the same as the previous screenshot. The main content area is titled 'Domestic Violence Assessment' and includes a 'Default Client's Last Assessment' button. Below this is a form with the following fields: 'Assessment Date' (09/01/2014), 'Domestic Violence Experience' (radio buttons for Yes, No, Client doesn't know, Client refused, Data Not Collected), and 'When Experience Occurred' (dropdown menu showing 'Within the past three months').

Financial Assessment

Complete the status for **“Income from Any Source”** and **“Non-Cash Benefits from Any Source”** with the provided drop down lists. If the status for either of these financial sources is **“Yes,”** you will be prompted to provide more information on the **“Type”** (definitions on next page) of income/benefit and the **amount (enter monthly amount)** with the list that appears below the status after selecting **“Yes.”** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

CLIENTTRACK USER MANUAL

Also input any income a child may receive (i.e., SSDI) on the head of household's income/benefits information. You will not complete a Financial Assessment for children in the household.

The screenshot shows the ClientTrack software interface. The top navigation bar includes 'Home', 'Clients', and 'Providers'. The client's name 'Jack Beanstalk' is displayed. The main form is titled 'Income and Sources, Non-Cash Benefits'. It contains instructions for recording income and a table for inputting data. The table has columns for 'Type', 'Description', and 'Monthly Amount'. The 'Type' column lists various income sources like Earned Income, Self Employment, Unemployment Insurance, etc. The 'Monthly Amount' column is currently empty.

Type	Description	Monthly Amount
Earned Income		
Self Employment		
Unemployment Insurance		
Other Pension		
Supplemental Security Income		
Social Security Disability Income		
Retirement (Social Security)		
Veteran's Pension		
Veteran's Disability Payment		
TANF		

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Self-Employment** – Income earned by individual who work for themselves
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Other Pension** – Cash payment made from a private employer
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Veteran's Pension** – Cash payment made by the Department of Veteran's Affairs
- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **TANF** –Temporary Assistance for Needy Families

CLIENTTRACK USER MANUAL

Definitions of Sources of Income

- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

ClientTrack

Welcome Autumn Gale (Training)

Home Clients Providers

Jack Beantalk
DOB: 12/4/1978
ClientID: 849507

Income and Sources, Non-Cash Benefits

Income

Type	Description	Monthly Amount
<input type="checkbox"/>	Earned Income	
<input type="checkbox"/>	Self Employment	
<input type="checkbox"/>	Unemployment Insurance	
<input type="checkbox"/>	Other Pension	
<input type="checkbox"/>	Supplemental Security Income	
<input type="checkbox"/>	Social Security Disability Income	
<input type="checkbox"/>	Retirement (Social Security)	
<input type="checkbox"/>	Veteran's Pension	
<input checked="" type="checkbox"/>	Veteran's Disability Payment	\$800.00
<input type="checkbox"/>	TANF	
<input type="checkbox"/>	Child Support	
<input type="checkbox"/>	Other Income	
Count/Total Monthly Income:		1 \$800.00

Non-Cash Benefits

Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	\$220.00
<input type="checkbox"/>	MEDICAID	
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance	
<input type="checkbox"/>	Other Source	
Count/Total Monthly Income:		1 \$220.00

Save and Close

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

CLIENTTRACK USER MANUAL

Adult Education

Complete the required information on the Adult Education Assessment. An education assessment will be prompted for each adult and child in the household. Click “Save” to continue in the workflow.

The screenshot shows the 'Adult Education Assessment' form in the ClientTrack application. The left sidebar contains navigation links for Intake, Program Enrollment, Assessment, and Case Management. The main form area includes fields for 'Assessment Date' (09/01/2014), 'Currently in School / Working on Degree' (No), 'Received Vocational Training/Apprenticeship' (No), 'Highest Grade Completed' (High school diploma), and 'Secondary Education' (None). A 'Default Client's Last Assessment' button is visible at the top right of the form area.

The Adult Education will conclude the workflow for your client unless there are additional household members to enroll. If you have additional household members to enroll, you will be prompted through the required assessments for each adult and child in the household. The assessments may vary depending on the data requirements for your specific project. The assessments required for adults will look the same as those outlined for the head of household. The assessments for children will look differently and are previewed in the next section of this manual.

HMIS Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click “Save” when finished with the assessment to continue in the workflow.

The screenshot shows the 'Universal Data Assessment' form for a child named Goldie Locke. The left sidebar is the same as the previous screenshot. The main form area includes fields for 'Assessment Date' (09/01/2014), 'Age at Assessment' (5), 'Assessment Type' (Entry), 'Assessor' (Autumn Gale), 'Program' (My Fake Organization (ESGS - R10)), 'In Permanent Housing' (No), and 'Housing Status' (Category 1 - Homeless). A 'Health Insurance' section asks if the client is covered by health insurance (No). A 'Note on Existing Sources' section provides instructions for updating insurance status. At the bottom, there is a table for recording insurance sources with columns for Type, Is Primary, Status, Reason No, Start Date, and End Date.

Type	Is Primary	Status	Reason No	Start Date	End Date
- SELECT -	<input type="radio"/>	- SELECT -	N/A		

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment for Child

The screenshot shows the 'Barriers' assessment form in ClientTrack. The client is Goldie Locks, born 1/1/2009, ClientID: 949908. The form is titled 'Barriers' and includes instructions: 'Use this form to identify whether a client has each individual barrier or not. You may, optionally, click View Barrier History to review previous barriers.' Below the instructions is a table for 'Assessment Active' with columns: Barrier, Barrier Present?, Receiving Services / Treatment, Condition is Indefinite, Documentation of the disability and severity on file, and How Confirmed. The table lists several barriers: Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. Each barrier has a dropdown menu for 'Barrier Present?' with a '- SELECT -' option. The 'How Confirmed' column has a dropdown menu with a 'v' icon. The 'Screen' dropdown is set to 'HMIS Barriers' and there is a 'Default Last Assessment' button.

Complete any barrier information for the child you are enrolling. If no barriers are present at enrollment, click **“Save & Close”** without changing barriers.

Child Education Assessment

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. Click **“Save”** when completed.

The screenshot shows the 'Child Education Assessment' form in ClientTrack. The client is Goldie Locks, born 1/1/2009, ClientID: 949908. The form is titled 'Child Education Assessment' and includes instructions: 'Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter the school name. If the child is not enrolled, enter date.' Below the instructions is a table for 'Assessment Active' with columns: Assessment Date, Highest Grade Completed, Current Enrollment Status, Type of School, School Name, Connected with McKinney-Vento School Liaison?, and Comments. The 'Assessment Date' is 09/01/2014. The 'Highest Grade Completed' is 'Nursery School to 4th Grade'. The 'Current Enrollment Status' is 'Yes'. The 'Type of School' is 'Public School'. The 'School Name' is 'Williams Elementary'. The 'Connected with McKinney-Vento School Liaison?' is 'No'. The 'Comments' field is empty.

Completing the Intake Workflow

The screenshot shows the 'Intake' workflow completion screen in ClientTrack. The client is Jack Beanstalk, born 12/4/1989, ClientID: 949907. The screen displays a message: 'You're done! All required steps have been completed.' Below the message is a 'Finish' button with the text 'Close the workflow'.

Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client record and you can see the new enrollment under **“Enrollments”** on the client record.

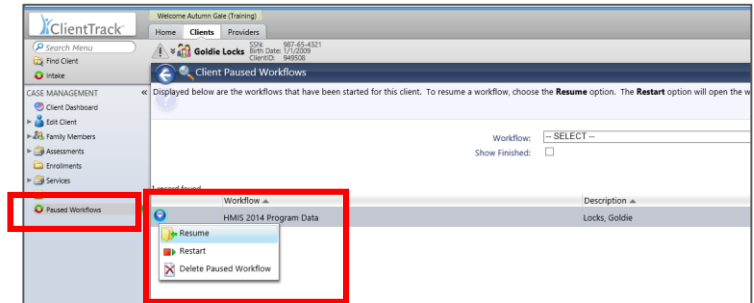
If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears in the upper

CLIENTTRACK USER MANUAL

left-hand corner of the client record (outlined in red). Clicking on the link beside the blue checkmark will take you to that specific section of the workflow where you can edit information.

Pausing a Workflow

You may also “Pause” a workflow by clicking on the pause button located in upper right-hand corner of the workflow window beside the black “X.” The black “X” will delete the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



To **resume a paused workflow**, click on “Paused Workflows” at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select “Resume” in the drop down. This will take you to where you paused the workflow and you can finish your program enrollment.

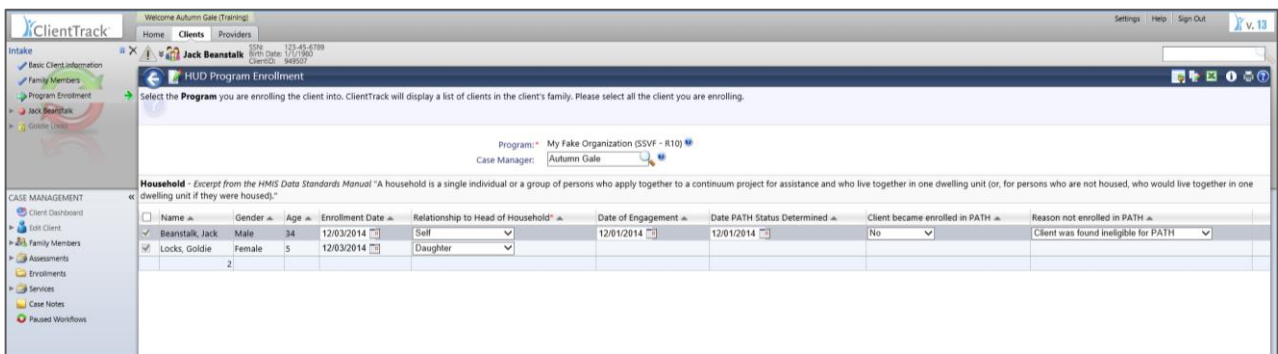
Unique Program Requirements at Entry

There are variations in data requirements for different program enrollments. Below are screenshots of program enrollments and their unique requirements during the Intake workflow for the following programs:

1. SSVF
2. PATH
3. HOPWA

1. SUPPORTIVE SERVICES FOR VETERAN FAMILIES (SSVF) ENROLLMENT

In addition to the previous assessments outlined earlier in this manual, the SSVF enrollment will require you to document a client’s eligibility for the PATH program on the “**Program Enrollment**” screen of the workflow. All fields with an **asterisk *** are required fields.



Name	Gender	Age	Enrollment Date	Relationship to Head of Household*	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
Beanstalk, Jack	Male	34	12/03/2014	Self	12/01/2014	12/01/2014	No	Client was found ineligible for PATH
Locks, Goldie	Female	5	12/03/2014	Daughter				

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The SSVF project enrollment will also require you to complete the **Annual Median Income (AMI)** for the client with the drop down provided. **“Address Prior to Entry”** will also be required to proceed in the workflow.

The screenshot shows the 'Universal Data Assessment' form in ClientTrack. The form is for client Jack Beanstalk (DOB: 12/03/1989, ClientID: 949507). The assessment date is 12/03/2014. The age at assessment is 34. The assessment type is 'Entry'. The assessor is Autumn Gale. The program is 'My Fake Organization (SSVF - R10)'. The housing status is 'Category 1 - Homeless'. The household income as a percentage of AMI is 'Less than 30%'. The client location is 'Indiana'. The filter client location (CoC) by state is 'Indiana'. The client location is 'Indiana Balance of State'. The prior residence is 'Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)'. The length of stay is 'More than one week, but less than one month'. The address prior to entry quality is 'Incomplete or estimated address reported'. The address is 'Indianapolis, IN 46205'. The length of time on street, in an emergency shelter, or safe haven is not recorded.

2. PROJECTS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT

To manage your PATH program and clients in ClientTrack, be sure to log into the **“2014 IHCD HMIS: Street Outreach”** workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document the **“Date of Engagement,” “Date PATH Status Determined”** and if the client became **enrolled in PATH**. Before completing the Intake workflow, you will also be required to document your PATH contact information as seen below.

The screenshot shows the 'HUD Program Enrollment' form in ClientTrack. The form is for client Jack Beanstalk (DOB: 12/03/1989, ClientID: 949507). The program is 'My Fake Organization Street Outreach (PATH-R10)'. The case manager is Autumn Gale. The household is defined as 'A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)'. The table below shows the enrollment details for Jack Beanstalk and his daughter, Goldie.

Name	Gender	Age	Enrollment Date	Relationship to Head of Household	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
Beanstalk, Jack	Male	34	12/04/2014	Self	12/01/2014	12/01/2014	Yes	
Locks, Goldie	Female	5	12/04/2014	Daughter				

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3. HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT

In addition to the entry assessments outlined earlier in this manual, for a HOPWA project enrollment you will be required to complete a **“Medical Assistance Assessment”** as seen below.

The screenshot shows the 'Assistance Assessment' form for client Jack Beanstalk. The form includes a header with the client's name, SSN, Birth Date, and ClientID. Below the header, there is a section for 'Assessment Active' with a date of 12/05/2014. The main table lists medical assistance types, their status, and reasons for non-application.

Medical Assistance Type	Status	Reason No (if applicable)
Receiving Public HIV/AIDS Medical Assistance	No	Applied: decision pending
Receiving AIDS Drug Assistance Program (ADAP)	No	Client did not apply

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the **“Services”** link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can **“Add New”** services or manage current services.

The screenshot shows the 'Client Services' window for client Jack Beanstalk. The window displays a table for service history with columns for Date, Service, Units, \$ Total, and Organization. The 'Add New' button is highlighted with a red box. The 'Services' link in the left-hand navigation menu is also highlighted with a red box.

To document a new services, click on **“Add New.”** You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not the area to write case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization’s needs. If a service does not appear in your agency’s options, contact the help desk to request that it be added.

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The screenshot shows the 'Service' form in ClientTrack. The client is Jack Beanstalk (SSN: 123-45-6789, Birth Date: 1/1/1980, Client ID: 989097). The form includes fields for Family Income (No Recent Income), Family Members (2), and Poverty Level (\$1,226.00). The Service is 'ESG - Rental Assistance' with an Enrollment date of 09/01/2014 and a Service date of 12/02/2014. The Units are 1.00 with a Unit Value of \$550.00, totaling \$550.00. The user performing the service is Autumn Gale. The location is My Fake Organization.

Field	Value
Family Income	No Recent Income
Family Members	2
Poverty Level	\$1,226.00
Enrollment	09/01/2014 - My Fake Organization (ESGS - R10)
Grant	-- SELECT --
Service	ESG - Rental Assistance
Date	12/02/2014
Units	1.00
Unit Value	\$550.00
Total	\$550.00
User Performing the Service	Autumn Gale
Comments	Check No. 1234

When you are finished documenting a service, click on the **“Save”** button and you will be taken back to the Services home screen where you can edit or delete a service you created.

Quick Services

When you need to add more than one service and the services were provided on the same date, you can use the **“Quick Services”** option to document all of the services at the same time. The **“Quick Services”** button is located beside the **“Add New”** button on the Services home screen. With this feature you can add multiple services to a client record at one time by selecting the **“Enrollment”** and checking the services with the **“Check Box”** next to the service you provided. If you need services added to the list of options, contact the HMIS Help Desk and a technician can customize that information for your agency.

The screenshot shows the 'Quick Service' screen in ClientTrack. It displays a list of services available for the client Jack Beanstalk. The 'Service Screen' is set to 'Direct Services'. The date is 12/02/2014. The provider is '09/01/2014 - My Fake Organization (ESGS - R10)'. The user performing the service is Autumn Gale. The location is My Fake Organization. A table shows the services added:

Service	Unit Type	Units	Unit Value	Total
Case Management (1)	Hours	1.00	\$22.00	\$22.00
Case Management	Hours	1.00	\$22.00	\$22.00

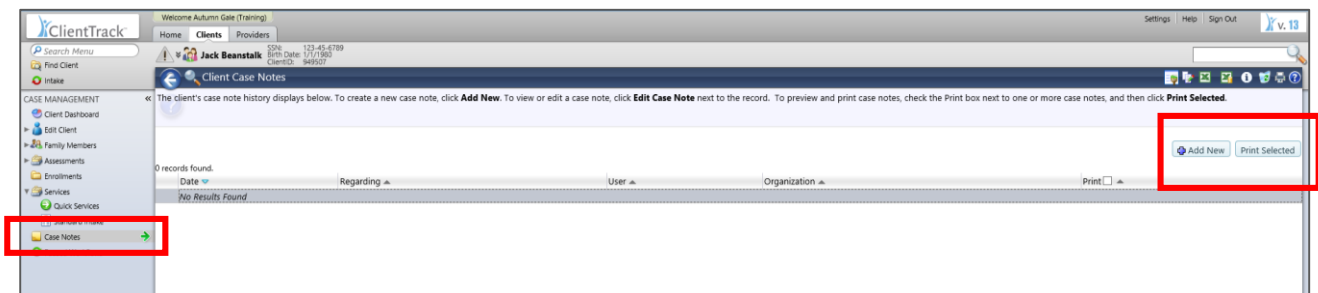
Once you are finished adding multiple services click on the **“Save & Close”** button and you will return to the Services home screen where you can view and manage services.

CLIENTTRACK USER MANUAL

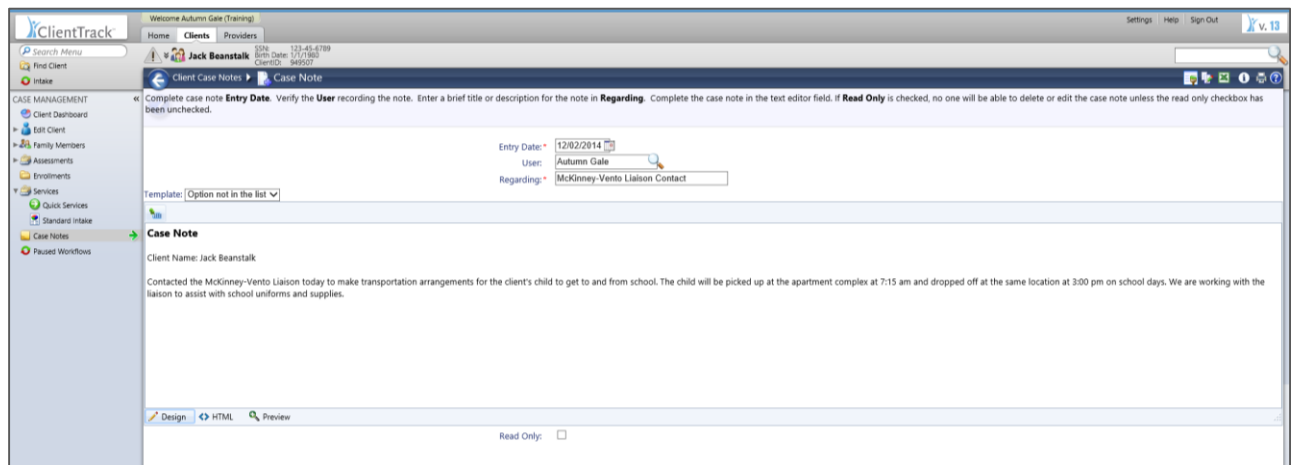
CASE NOTES

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes.

To add case notes, click on the “**Case Notes**” link in the list of case management tools on the left-hand side of the screen. Click on the “**Add New**” button on the upper right-hand side of the screen. ***Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.***



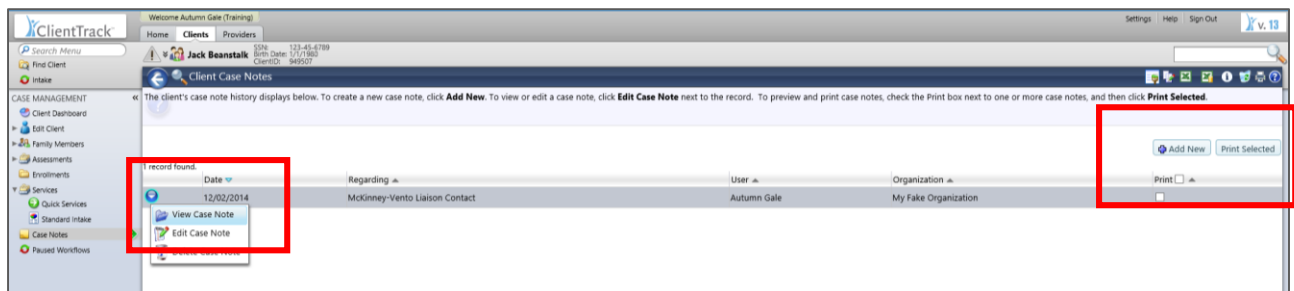
An example of a case note is below. Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.



Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue play button beside the case note to:

- View Case Note
- Edit Case Note

CLIENTTRACK USER MANUAL



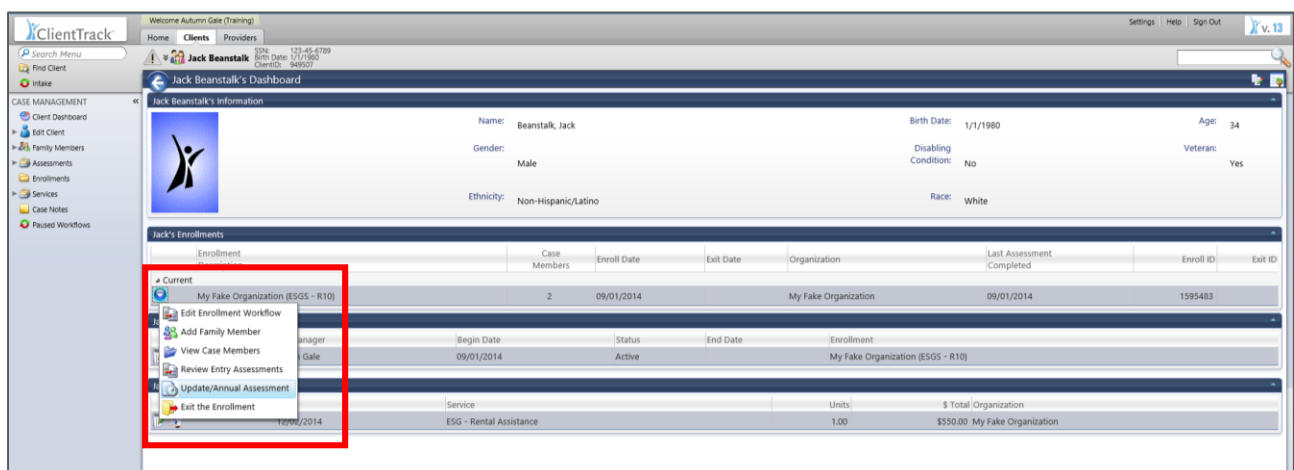
You can also select case notes to print by clicking on the **“Print”** box located in the far column and clicking on the **“Print Selected”** button beside the **“Add New”** button. This will print all of the “checked” case notes.

UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **“Update/Annual Assessment”** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer; and some programs like SSVF require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes, a client receives his/her GED, or a baby is born and needs to be added to the household and enrollment. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the blue play button beside your program enrollment;
- Select “Update/Annual Assessment” from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.



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The first screen you will be taken to will review the household members and the enrollment. Click **“Save”** or **“No Changes”** in the bottom right-hand corner to continue in the workflow.

The screenshot shows the 'HUD Program Enrollment' screen in ClientTrack. The left sidebar contains navigation links: Annual Assessment, Enrollment, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area displays the client's information: Jack Beanstalk (DOB: 12-45-1979, ClientID: 849507). Below this, there's a section for 'Household' with a definition: 'A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)'. A table lists household members:

Name	Gender	Age	Enrollment Date	Relationship to Head of Household
Beanstalk, Jack	Male	34	09/01/2014	Self
Locks, Goldie	Female	5	09/01/2014	Daughter

At the bottom right, there are buttons for 'Save' and 'No Changes'.

HMIS Universal Data Assessment

You will then review the head of household's universal data where you can document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if done at another time.

The screenshot shows the 'Universal Data Assessment' screen in ClientTrack. The left sidebar is the same as the previous screen. The main content area displays the client's information: Jack Beanstalk (DOB: 12-45-1979, ClientID: 849507). Below this, there's a section for 'Universal Data Assessment' with a definition: 'Complete the information below related to the selected client's housing status and other relevant information.' The form includes fields for: Assessment Date (11/20/2014), Age at Assessment (34), Assessment Type (During Program Enrollment), Assessor (Autumn Gale), Program (My Fake Organization (ESGS - R10)), In Permanent Housing (Yes), and Date of Move-In (11/19/2014). Below these fields, there's a section for 'Client Location' with a definition: 'Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflow.' This section includes a dropdown for 'Filter Client Location (Coc) by State' (Indiana) and a text field for 'Client Location' (Indiana Balance of State). Below this, there's a section for 'Health Insurance' with a definition: 'Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.' This section includes a dropdown for 'Health Insurance' (Yes). Below this, there's a section for 'Note on Existing Sources' with a definition: 'If a client had an insurance source but no longer has it. Please enter an end date and update the status appropriately.' This section includes a table with columns: Type, Is Primary, Status, Reason No, Start Date, and End Date. The table has one row with 'Medicaid' as the Type, 'Active' as the Status, and 'Yes' as the Reason No. At the bottom right, there are buttons for 'Add Lines' and 'Save'.

CLIENTTRACK USER MANUAL

HMIS Barriers Assessment

Review the HMIS Barriers and make any changes necessary. You may use the **“Default Last Assessment”** button at the top of the screen if the data that was entered on the last assessment has remained the same. This is a helpful feature if an assessment requires significant data entry. It will populate all of the

information previously entered for you. If no barriers are present, click **“Save & Close”** to move forward in the workflow.

The screenshot shows the 'Barriers' assessment form for client Jack Beanstalk. The 'Default Last Assessment' button is highlighted with a red box. The form includes a table for recording barriers and their status.

Barrier	Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	How Confirmed
Alcohol Abuse	SELECT				
Developmental Disability	SELECT				
Drug Abuse	SELECT				
HIV/AIDS	SELECT				
Mental Health	SELECT				
Physical Disability	SELECT				
Chronic Health Condition	SELECT				

Financial Assessment

Review the Financial information for the head of household and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

The screenshot shows the 'Income and Sources, Non-Cash Benefits' assessment form for client Jack Beanstalk. The 'Income' section is highlighted with a red box. The form includes a table for recording income sources and their amounts.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment at	\$800.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> TANF		

Count/Total Monthly Income: 1 \$800.00

Save and Close

CLIENTTRACK USER MANUAL

ClientTrack - Welcome Autumn Gate (Training)

Home Clients Providers

Annual Assessment

Enrollment

Annual Assessment

Income

Education

Locks, Guide

CASE MANAGEMENT

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Jack Beanstalk

DOB: 12/45/1989

Birth Date: 12/17/1989

ClientID: 949507

Income and Sources, Non-Cash Benefits

Income	Type	Description	Monthly Amount
<input checked="" type="checkbox"/>	Earned Income	Part-time employment	\$600.00
<input type="checkbox"/>	Self Employment		
<input type="checkbox"/>	Unemployment Insurance		
<input type="checkbox"/>	Other Pension		
<input type="checkbox"/>	Supplemental Security Income		
<input type="checkbox"/>	Social Security Disability Income		
<input type="checkbox"/>	Retirement (Social Security)		
<input type="checkbox"/>	Veteran's Pension		
<input type="checkbox"/>	Veteran's Disability Payment		
<input type="checkbox"/>	TANF		
<input type="checkbox"/>	Child Support		
<input type="checkbox"/>	Other Income		
Count/Total Monthly Income:			1 \$600.00

Non-Cash Benefits

Non-Cash Benefits	Description	Monthly Amount
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	\$220.00
<input type="checkbox"/>	MEDICAID	
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance	
<input type="checkbox"/>	Other Source	
Count/Total Monthly Income:		1 \$220.00

Save and Close

Adult Education Assessment

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **"Default Client's Last Assessment"** will populate information from the previous assessment completed and is helpful if the client's information has not changed. Click **"Save"** when finished.

ClientTrack - Welcome Autumn Gate (Training)

Home Clients Providers

Annual Assessment

Enrollment

Annual Assessment

Income

Education

Locks, Guide

CASE MANAGEMENT

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Jack Beanstalk

DOB: 12/45/1989

Birth Date: 12/17/1989

ClientID: 949507

Adult Education Assessment

Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received diploma or above, select the secondary education degree(s) the client has earned.

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/20/2014

Currently in School / Working on Degree: No

Received Vocational Training/Apprenticeship: No

Highest Grade Completed: High school diploma

Secondary Education: None

Associates Degree

Bachelors

Masters

Doctorate

Other non-degree/nonfunctional degree

CLIENTTRACK USER MANUAL

HMIS Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.

The screenshot shows the 'Universal Data Assessment' form in ClientTrack. The form is for a child named 'Goldie Locks' (DOB: 1/1/2009, ClientID: 949308). The assessment date is 12/03/2014, and the age is 5. The assessment type is 'During Program Enrollment'. The assessor is 'Autumn Gale' and the program is 'My Fake Organization (ESGS - R10)'. The client is not in permanent housing. The health insurance section indicates 'Yes' for health insurance. A table below lists existing insurance sources, with 'Medicaid' currently active from 1/26/12 to 1/1/14. The left sidebar shows navigation options like 'Annual Assessment', 'Enrollment', and 'Case Management'.

Assessment Date: 12/03/2014
Age at Assessment: 5
Assessment Type: During Program Enrollment
Assessor: Autumn Gale
Program: My Fake Organization (ESGS - R10)
In Permanent Housing: No

Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.
Health Insurance: Yes

Note on Existing Sources - If a client had an insurance source but no longer has it, please enter an end date and update the status appropriately.

Type	Is Primary	Status	Reason No	Start Date	End Date
Medicaid	<input checked="" type="radio"/>	Active		1/26/12	1/1/14
- SELECT -	<input type="radio"/>	- SELECT -			

Add Lines: 1

HMIS Barriers Assessment for Child

Complete the Barriers Assessment for the child. If no barriers are reported, click **"Save & Close"** to continue in the workflow.

The screenshot shows the 'Barriers' assessment form in ClientTrack. The form is for the same child, 'Goldie Locks'. It asks to identify individual barriers. A table lists various barriers with dropdown menus for 'Present?' (Yes/No) and 'How Confirmed'. The barriers listed are Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The left sidebar is the same as in the previous screenshot.

Assessment Active

Barrier	Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	How Confirmed
Alcohol Abuse	- SELECT -				
Developmental Disability	- SELECT -				
Drug Abuse	- SELECT -				
HIV/AIDS	- SELECT -				
Mental Health	- SELECT -				
Physical Disability	- SELECT -				
Chronic Health Condition	- SELECT -				

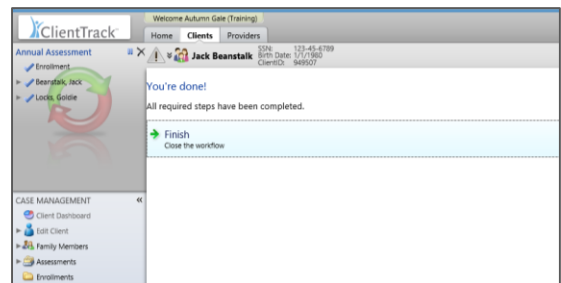
CLIENTTRACK USER MANUAL

Child Education Assessment

The screenshot shows the 'Child Education Assessment' form in ClientTrack. The form is for a client named Goldie Locks. It includes fields for 'Assessment Date' (12/03/2014), 'Highest Grade Completed' (Nursery School to 4th Grade), and 'Current Enrollment Status' (Yes, No, Don't Know, Refused). There are also dropdowns for 'Type of School' (Public School) and 'School Name' (Williams Elementary). A 'Comments' field is at the bottom.

Enter the “**Highest Grade Completed**” for the child, and then select if the child is “**Currently Enrolled in School.**” The built in logic may require additional information depending on how you answer the questions. Click “**Save**” when completed.

Once you have completed the required entry assessments for your client and household members, you will be prompted to “**Finish**” the workflow. If the workflow is complete then click “**Finish.**” You will then be directed back to the head of household’s client record.



PROGRAM DISCHARGE

When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

The screenshot shows the 'Jack Beanstalk's Dashboard' in ClientTrack. It displays client information for Jack Beanstalk, including Name, Gender, Birth Date, Age, Disabling Condition, Veteran status, Ethnicity, and Race. Below this is a table of 'Jack's Enrollments'. A red box highlights the 'Exit the Enrollment' option in the left sidebar.

Enrollment	Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current	My Fake Organization (ESGS - R10)	2	09/01/2014		My Fake Organization	11/20/2014	1595483	

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;

CLIENTTRACK USER MANUAL

- Select “Exit the Enrollment” in the drop down list that appears after clicking on the blue play button; and
- Complete the information prompted for through the Exit workflow and save as you go.

On the first screen of the exit workflow, you will be asked for the “Exit Date,” “Destination,” “Exit Reason,” and whether to “End Case Assignment.” Please note that all fields with an **asterisk *** are required.

HMIS Barriers at Exit

Barrier	Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	How Confirmed
Alcohol Abuse	SELECT				
Developmental Disability	SELECT				
Drug Abuse	SELECT				
HIV/AIDS	SELECT				
Mental Health	SELECT				
Physical Disability	SELECT				
Chronic Health Condition	Yes	Yes	Yes	Yes	

You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no barriers, click on “Save & Close” in the lower right hand corner.

HMIS Universal Data at Exit

Complete the required information and click “Save” to continue.

Type	Is Primary	Status	Reason No
Medicaid		Active	
SELECT		SELECT	

CLIENTTRACK USER MANUAL

Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

The screenshot shows the ClientTrack application window. The left sidebar contains navigation links: HUD Program Exit, Exit Assessment, Starters / Special Needs, Income, Education, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Income and Sources, Non-Cash Benefits' and includes instructions from the HMIS Data Manual. Below the instructions, there are dropdown menus for 'Assessment Date' (set to 12/03/2014), 'Income from Any Source' (set to Yes), 'Non-Cash Benefits from Any Source' (set to Yes), and 'Expenses' (set to -- SELECT --). A table titled 'Income' is displayed with columns for 'Type', 'Description', and 'Monthly Amount'. The table contains several rows, with 'Earned Income' selected and showing a monthly amount of \$800.00. The bottom of the form shows a summary: 'Count/Total Monthly Income: 1 \$800.00'. A 'Save and Close' button is located at the bottom right.

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment	\$800.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> TANF		

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Self-Employment** – Income earned by individual who work for themselves
- **Unemployment Insurance** – Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Other Pension** – Cash payment made from a private employer
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Veteran's Pension** – Cash payment made by the Department of Veteran's Affairs
- **VA Service-Connected Disability** – A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty

CLIENTTRACK USER MANUAL

Definitions of Sources of Income Continued

- **VA NonService-Connected Disability** – To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

The screenshot shows the ClientTrack application window. The title bar says 'Welcome Autumn Gale (Training)'. The main menu includes 'Home', 'Clients', and 'Providers'. The client 'Jack Beanstalk' is selected, with details: SSN 123-45-6789, Birth Date 1/1/1980, ClientID 9449007. The left sidebar shows navigation options like 'HUD Program Exit', 'Exit Enrollment', 'Exit Assessments', 'Services / Special Needs', 'Income', 'Education', 'CASE MANAGEMENT', 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Case Notes', and 'Paced Workflows'. The main area displays the 'Income and Sources, Non-Cash Benefits' form. The 'Income' section contains a table with the following data:

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income	Part-time employment	\$800.00
<input type="checkbox"/> Self Employment		
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Other Pension		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> TANF		
<input type="checkbox"/> Child Support		
<input type="checkbox"/> Other Income		
Count/Total Monthly Income:		1 \$800.00

The 'Non-Cash Benefits' section contains a table with the following data:

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Food Stamps/Money for food on benefits card	SNAP	\$220.00
<input type="checkbox"/> MEDICAID		
<input type="checkbox"/> MEDICARE		
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children		
<input type="checkbox"/> Veteran's Administration Medical Services		
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> Section 8, Public Housing, or Other Rental Assistance		
<input type="checkbox"/> Other Source		
Count/Total Monthly Income:		1 \$220.00

At the bottom right of the form is a 'Save and Close' button.

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

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Adult Education Assessment

The screenshot shows the 'Adult Education Assessment' form for client Jack Beanstalk. The form includes a sidebar with navigation links like 'HUD Program Exit', 'Exit Enrollment', 'Exit Assessments', 'Locks Guide', 'Do you want to exit?', 'Exit Enrollment', and 'Exit Assessments'. The main content area has a 'Default Client's Last Assessment' button and a section for 'Assessment Active'. The 'Assessment Date' is set to 12/03/2014. The 'Currently in School / Working on Degree' is 'No'. The 'Received Vocational Training/Apprenticeship' is 'No'. The 'Highest Grade Completed' is 'High school diploma'. The 'Secondary Education' dropdown is set to 'None', with other options like 'Associates Degree', 'Bachelors', 'Masters', 'Doctorate', and 'Other (secondary school or postsecondary diploma)' visible.

Complete the Adult Education Assessment. Remember that all fields with an asterisk * are required. The **“Default Client's Last Assessment”** will populate information from the previous assessment completed and is helpful if the client's information has not changed. Click **“Save”** when finished.

Exit for Child

After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household's assessments. The exit assessments will look differently for children.

The screenshot shows the 'Enrollment Exit' form for client Goldie Locks. The form includes a sidebar with navigation links like 'HUD Program Exit', 'Exit Enrollment', 'Exit Assessments', 'Locks Guide', 'Do you want to exit?', 'Exit Enrollment', and 'Exit Assessments'. The main content area has a 'Default Client's Last Assessment' button and a section for 'Enrollment Exit'. The 'Exit Date' is set to 12/03/2014. The 'Exit Reason' is 'Left for a housing opportunity before completing program'. The 'Case Manager Assignment' is 'Autumn Gale'. The 'End Case Assignment' is checked.

HMIS Universal Data Assessment at Exit for Child

Complete the required information on the HMIS Universal Data Assessment at exit for the child and click **“Save”** to continue.

The screenshot shows the 'Universal Data Assessment' form for client Goldie Locks. The form includes a sidebar with navigation links like 'HUD Program Exit', 'Exit Enrollment', 'Exit Assessments', 'Locks Guide', 'Do you want to exit?', 'Exit Enrollment', and 'Exit Assessments'. The main content area has a 'Default Client's Last Assessment' button and a section for 'Universal Data Assessment'. The 'Assessment Date' is set to 12/03/2014. The 'Age at Assessment' is 5. The 'Assessment Type' is 'Exit'. The 'Assessor' is 'Autumn Gale'. The 'Program' is 'My Fake Organization (ESGS - R10)'. The 'In Permanent Housing' is 'No'. The 'Health Insurance' is 'Yes'. The 'Note on Existing Sources' section is expanded, showing a table with columns for 'Type', 'Is Primary', 'Status', 'Reason No', 'Start Date', and 'End Date'. The table contains one row for 'Medicaid' with 'Is Primary' checked, 'Status' set to 'Active', and 'Start Date' set to 12/01/2014.

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HMIS Barriers Assessment at Exit for Child

The screenshot shows the 'Barriers' assessment form in ClientTrack. The client is Goldie Locks, born 7/1/2009. The form includes a table for listing barriers:

Barrier	Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	How Confirmed
Alcohol Abuse	- SELECT -				
Developmental Disability	- SELECT -				
Drug Abuse	- SELECT -				
HIV/AIDS	- SELECT -				
Mental Health	- SELECT -				
Physical Disability	- SELECT -				
Chronic Health Condition	- SELECT -				

Complete the Barriers Assessment for the child at exit. If no barriers are reported, click **“Save & Close”** to continue in the workflow.

Child Education Assessment at Exit

The screenshot shows the 'Child Education Assessment' form. The client is Goldie Locks. The form includes the following fields:

- Assessment Date: 12/03/2014
- Highest Grade Completed: Nursery School to 4th Grade
- Current Enrollment Status: ☒ Yes, ☐ No, ☐ Don't Know, ☐ Refused
- Type of School: Public School
- School Name: Williams Elementary
- Connected with McKinney-Vento School Liaison?: No
- Comments: (empty text area)

Enter the **“Highest Grade Completed”** for the child, and then select if the child is **“Currently Enrolled in School.”** The built in logic may require additional information depending on how you answer the questions. Click **“Save”** when completed

Completing Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **“Finish”** to complete the discharge for your clients.

The screenshot shows the 'You're done!' completion screen. It states 'All required steps have been completed.' and features a large green arrow pointing to a 'Finish' button with the text 'Close the workflow'.

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You will then return to the client dashboard where you can see the project exit dates now as see below. If you have also selected **“End Case Assignment”** on the exit workflow, you will see that your status has changed to **“Inactive”** on the client dashboard under **“Case Manager Assignments.”** If you forgot to click on the box beside **“End Case Assignment”** during the exit workflow, you can click on the little notepad beside your name under **“Case Manager Assignments”** to edit your status to **“Inactive”** to remove the discharged client from your case load.

ClientTrack - Welcome Autumn Gale (Training)

Home Clients Providers

Jack Beanstalk's Dashboard

Jack Beanstalk's information

Name: Beanstalk, Jack Birth Date: 1/1/1980 Age: 34
Gender: Male Disabling Condition: Yes Veteran: Yes
Ethnicity: Non-Hispanic/Latino Race: White

Jack's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Fake Organization (ESGS - R10)	2	09/01/2014	12/03/2014	My Fake Organization	12/03/2014	1595483	1595489

Jack's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Autumn Gale	09/01/2014	Inactive	12/01/2014	My Fake Organization (ESGS - R10)

12/02/2014 Service: ESG - Rental Assistance Units: 1.00 \$ Total: Organization: \$350.00 My Fake Organization

Unique Program Requirements at Exit

There are variations in data requirements for different program exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following programs:

1. SSVF
2. PATH
3. HOPWA

1. SSVF EXIT

For SSVF clients being discharged, their **“Date of PATH Status Determined”** and their **PATH enrollment status** will be required during the exit workflow on the **“Enrollment Exit”** screen as seen below.

ClientTrack - Welcome Autumn Gale (Training)

Home Clients Providers

Jack Beanstalk's Dashboard

Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date** and **Destination**.

Exit Date: 12/03/2014
Date of PATH Status Determined: 12/01/2014
Client became enrolled in PATH: Yes
Destination: Permanent housing for formerly homeless persons (such as: CoC project, or HUD legacy programs; or HOPWA PH)
Exit Reason: Left for a housing opportunity before completing program
Case Manager Assignment: Autumn Gale
End Case Assignment: ☒

CLIENTTRACK USER MANUAL

2. PATH EXIT

For PATH clients being discharged, their **“Date of PATH Status Determined”** and their **PATH enrollment status** will be required during the exit workflow on the “Enrollment Exit” screen as seen below.

The screenshot shows the 'Enrollment Exit' screen in the ClientTrack application. The left sidebar contains navigation links for HUD Program Exit, Exit Enrollment, Exit Assessments, and CASE MANAGEMENT. The main content area is titled 'Jack Beanstalk's Dashboard' and 'Enrollment Exit'. It includes a welcome message for Autumn Gale (Training) and a form to exit the client from the Enrollment. The form fields are: Exit Date (12/05/2014), Date of PATH Status Determined (12/01/2014), Client became enrolled in PATH (Yes), Destination (Permanent housing for formerly homeless persons (such as: CoC project, or HUD legacy programs, or HOPWA PH)), Exit Reason (Left for a housing opportunity before completing program), Case Manager Assignment (Autumn Gale), and End Case Assignment (checked).

3. HOPWA EXIT

A Housing Assessment will be required at exit for HOPWA clients as seen below.

The screenshot shows the 'Housing Assessment' screen in the ClientTrack application. The left sidebar contains navigation links for HUD Program Exit, Exit Enrollment, Exit Assessments, and CASE MANAGEMENT. The main content area is titled 'Jack Beanstalk's Dashboard' and 'Housing Assessment'. It includes a welcome message for Autumn Gale (Training) and a form to collect the client's housing assessment disposition at exit. The form fields are: Assessment Date (12/08/2014), Housing Assessment at Exit (Moved to new housing unit), and Subsidy For New (With on-going subsidy).

Basic Reports

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **"Service Reports"** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the "Service Reports" link.
- Click on **"Service Summary Reports"** that immediately appears under "Service Reports" with a file folder beside it.
- Click on **"Service Summary"** that appears directly in the drop down beneath "Service Summary Reports" after clicking on it.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
 - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
 - **Filtering by "Programs"** – Select the **"Program"** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **"Program"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
 - **Selecting "Grants"** – Select the **"Grant"** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Program(s)" you selected in the "Filter by Program(s)" box. If more than one grant appears, simply select more than one **"Grant"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
 - **Filtering by User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your

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organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.

- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the pdf icon in the upper right-hand corner of the report window.

ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

To Run an APR:

- Click on **“Reports”** found in the list of options in the bottom left-hand corner of your User Dashboard.
- Click on **“HMIS Reports”** found in the list of links on the left-hand side of the screen. A list of reports should drop down after clicking on the “HMIS Reports” link.
- Select **“APR for CoC Grant-Funded Programs”** in the list of reports that appear in the drop down.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
 - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014. This will give you all of the clients in your program for the entire year of 2014.
 - **Choosing the “Grant Program” and “Grant Program Component”** - Select the grant your program is under in the drop down for **“Grant Program.”** This will prompt the next selection in **“Grant Program Component.”** If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing HMISHelpDesk@ihcdaonline.com. Also note that **“Grant Program”** and **“Grant Program Component”** are not required fields, so you can run the report without making these selections, which is best done when running reports for several projects.
 - **Selecting “Grants”** – You may see several options to choose from after selecting **“Grant Program”** and **“Grant Program Component.”** Again, the aforementioned Grant Program and Grant Program Component will determine the options you see in this box. Select the **“Grant”** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **“Grant”** by clicking on the name in the box. Again,

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you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.

- **Clicking on “Project Type”** - Select a project type with the drop down list that appears. You may only select one “Project Type” at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting “Project Type” and “Program,” but the measurement on the last page will not populate data.
- **Clicking on “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the “Grant” parameter.
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

To Drill Down and Find Missing Data

After you run your report and it opens in the new window, you can click through it and see what sections of the report show “Missing” data. To find clients who are missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data, for example “Q.7 Data Quality.”
*Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.
- Another window will pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the pop up window. You will be asked to “Open” or “Save” the spreadsheet, select “Open” to review the data. *Be sure to clear your downloads in your Internet browser after exporting client data.*
- You will see the word “**MISSING**” on the spreadsheet where clients are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after an HMIS technician has set up the master assessment. If you need assistance with setting up the master assessment, contact the HMIS Help Desk at HMISHelpDesk@ihcdaonline.com. Follow these steps to complete missing data on the assessments:

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- Go to the client's record who is missing the assessments.
- Click on the blue play button found on the client dashboard under "[Client Name] Enrollments" located centrally on the client's record.
- Select "Review Entry Assessments" or "Review Exit Assessments" (depending on which one you need to complete) in the drop down list.
- Complete the required entry or exit assessments by clicking on the little notepad beside each assessment.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on "Save."
- Blue check marks will appear after the assessment is completed.

Enrollment ID	Begin Date	Status	Exit Date
1	10/05/2013	Inactive	10/05/2013
2	09/16/2013	Inactive	09/18/2013
2	08/27/2013	Inactive	08/27/2013

Assessment	Finished
HMIS Universal Data	<input checked="" type="checkbox"/>
Legal	<input checked="" type="checkbox"/>
Transportation	<input checked="" type="checkbox"/>
Chronic Homelessness	<input checked="" type="checkbox"/>
HMIS Barriers	<input checked="" type="checkbox"/>
Domestic Violence	<input checked="" type="checkbox"/>
Financial	<input checked="" type="checkbox"/>
Employment (Adult Only)	<input checked="" type="checkbox"/>
Adult Education	<input checked="" type="checkbox"/>
Child Education	<input checked="" type="checkbox"/>
Health	<input checked="" type="checkbox"/>
Veteran Assessment (Adult Only)	<input checked="" type="checkbox"/>

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

The CAPER is a comprehensive report of your ESG program – who you served and how you served them. Here are quick steps to running the report and viewing the data:

To Run a CAPER

- Click on **"Reports"** found in the list of options in the bottom left-hand corner of your user dashboard.
- Click on **"HMIS Reports"** found in the list of links in the upper left-hand corner of the screen. A list of reports should drop down after clicking on the "HMIS Reports" link.
- Select **"Emergency Solutions Grant (ESG) CAPER"** in the list of reports that appear in the drop downs.
- Set up your report parameters by: *(Please note that all fields with an **asterisk *** are required fields)*
 - **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Begin Date."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2014 and 12/31/2014 will give me all of the clients in the program for the entire year of 2014.
 - **Choosing the "Reporting Period Criteria"** – There are two options from which to choose. It is defaulted at **"Include Program Participants Based Only on the Date Range Provided."** This is the option you need. This will include clients who were enrolled in your program during the date range you specified.
 - **Selecting "ESG Grants"** – Click on **"Filter by ESG Grants"** and a small black check mark will appear as well as a list of options to choose from below. Select your grant by clicking on

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it and a green check mark will appear to indicate it has been selected. You may choose multiple grants by clicking on more than one. To unselect one, simply click on it again and the green check mark will disappear.

- **Clicking on “Programs”** – Click on **“Filter by Programs”** to select your program and a small black check mark will appear as well as a list of options to choose from below. To select a program, click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well.
- Click on the “Report” button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.
- Click on the small ☐ beside the text where present and it will provide client information for that specific definition.
- You can export this report to a PDF file or Excel file by clicking on the appropriate icon in the upper right-hand corner of the pop up window where you see the report.